

LBNL – PROCUREMENT STANDARD PRACTICES

Section: 15 Subcontracting by Negotiation

Subject: 15.2 Preproposal Conference

PURPOSE: This standard practice (SP) describes the Laboratory's guidelines for a preproposal conference.

POLICY: Prospective offerors shall be provided equal access to information about a solicitation. A preproposal conference may be held to ensure equal access to information and provide an equitable opportunity for offerors to compete for subcontracts.

SCOPE: This SP applies to all solicitations exceeding the small purchase threshold.

PROCEDURES:

Applicability

A preproposal conference should be considered when planning a large dollar value, complex, or unusual subcontract for which it may be beneficial to

- Clarify the specifics of the solicitation or
- Conduct a site visit of the facilities where the subcontractor is expected to perform the work.

Scheduling the Preproposal Conference

A preproposal conference is usually held after a solicitation is issued and before the deadline for submission of proposals. (A presolicitation conference with potential offerors may be held to discuss the Laboratory's requirements and/or to confirm market capabilities before solicitation.) Sufficient time should be allowed between the conference and the proposal deadline for the Laboratory to amend the solicitation, as appropriate, and for offerors to incorporate the information disclosed into their proposals.

The solicitation may contain notice of the conference or notice may be provided after issuance of the solicitation, provided there is adequate time for offerors to arrange for attendance. The notice will indicate the time, place, nature, and scope of the conference and any special requirements regarding access, if applicable. The procurement specialist shall make all arrangements for the conference, including site access for attendees as required.

Attendees

All solicited offerors must be invited to attend the conference and encouraged to submit questions in writing prior to the conference. Laboratory technical and legal representatives typically attend the conference and/or make presentations, if their contributions would aid explanation of the Laboratory's requirements. The requesting organization usually covers the cost of the conference.

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Objectives

A preproposal conference should accomplish the following objectives:

- Outline principal features of the project and subcontract;
- Fully describe all details of the work, plans, and specifications;
- Explain and clarify instructions for completion of the proposal in response to the solicitation;
- Provide an opportunity for the offerors to gain a better understanding of the objectives of the subcontract;
- Stress the importance of significant elements of the solicitation; and
- Allow offerors to judge whether they wish to incur the costs of preparing a proposal.

Communication

Answers to offerors' previously submitted questions are prepared and delivered during the conference by the procurement specialist. Preproposal conference attendees must be advised that all remarks and explanations made by Laboratory personnel will not qualify, change, or otherwise alter the terms of the solicitation and that only a formal written amendment to the solicitation is binding.

The procurement specialist will provide a list of all conference attendees and a written record of the conference proceedings, including any new material provided at the conference and questions and answers addressed, to all potential offerors, regardless of whether they attend the conference, before the due date for submission of offers.

Amendments

Solicitations must be formally amended to qualify, change, or otherwise alter the terms or any requirement of the solicitation.

RESPONSIBILITIES:

Procurement Specialist

The procurement specialist must:

- Decide whether to hold a preproposal conference;
- Make all arrangements for the conference, including site access for offerors as required;
- Conduct the conference;
- Answer offerors' previously submitted questions during the conference;
- Make a complete written record of the conference;
- Provide a list of attendees to all potential offerors;

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- Amend the solicitation as necessary; and
- Ensure that all potential offerors receive a written record of the conference proceedings, including any new material provided at the conference and questions and answers addressed, and/or any amendments.